

THE IMPACTFUL ADVISOR
TURNS ONE!



**An update
from Geni**



Dear Friends,

It's summer and we are almost half-way through the year. This is supposed to be the slow season for us accounting types, but so far, I'm not seeing it. Are you?

May was a crazy month with three weeks in a row of travel to LIVE Events. It was a blast to see people in person again and felt like we were getting back to normal, finally. But now it seems that Covid hasn't really left us. This means that we still aren't functioning in a "normal" time or doing "normal" work. But I don't know that there is ever a normal.

The more "abnormal" things get, the more important it is for you to work with your clients to help them make better decisions.

I have two group training classes that meet this week.

In the first group, we talked about the importance of educating not just business owners, but also leaders and their teams about financial concepts. Without training, how can we expect anyone to be responsible for financial results? This is the baseline for any other advisory work we deliver (it's called Financial Fluency in our Level 2 materials.)

The second group is discussing Level 3 tools for uncovering the underlying client challenges so we can help them find their way to better answers. These are tools that can be used to really make a difference for a client who is trying to deal with uncertainty.

Take some time to ask your clients how they are doing and if their teams are trained in financial concepts. If not, see how you might help them. Then ask them if they have taken stock of their business in light of recent changes. What new goals do they have for the rest of the year?

One Year Already?

It is hard to believe we have been doing this for a year already, but it has been an absolute pleasure to have shared these tools with 60 people so far! Just imagine the impact they have made on businesses over the last 12 months. It makes me so happy.

What are you celebrating this month? [Let me know.](#)

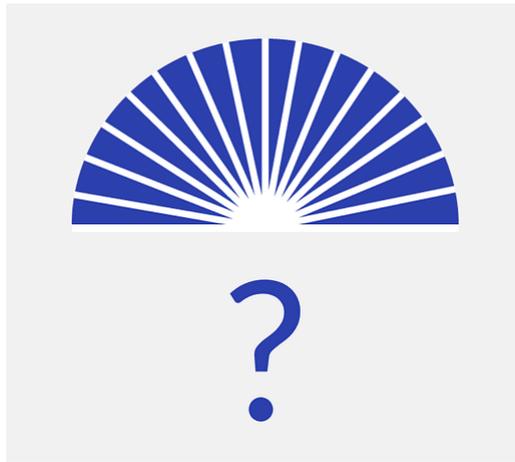
Now, go forth and make some magic happen for yourself and your clients!

-Geni



NEW: Tool-A-Month

Have you completed the [Level 5 Training](#), but are trying to figure out how to start implementing the tools into your practice? I am now offering a **NEW** way to receive ongoing support through my new [Tool-A-Month Club](#). Through providing a tool, ideas and accountability, you will gain the confidence to implement all that you have learned to change your practice. Check out: [Tool-A-Month](#)



Question of the month:

How do I know if I am offering advisory services?

This question is for you, the advisor.

I define advisory services as any service that helps a business owner move the needle in creating the life of his or her dreams. I don't see tax returns or financial statements in that light, do you? Let me know your thoughts by tagging me on [Twitter](#)



Upcoming speaking events:

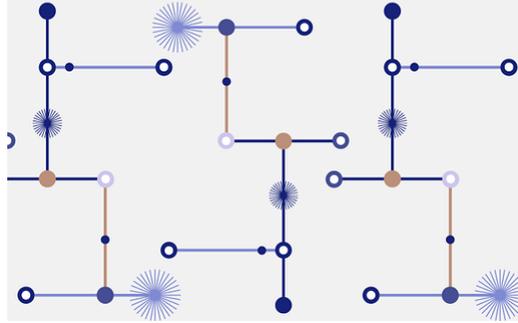
6/15 Online: **TODAY** [LinkedIn Live with Dan Luthi of Ignite Spot](#)

6/17 Online: [Combating Common Time Wasters in Your Accounting Firm](#)

6/20 Online: [How to Create Capacity for Advisory Services](#)

6/24 Online: [Why Advisory?](#)

Grits challenge



Slapstick Grits

Who loves Dad Jokes? Anyone need a reason to laugh today? I found a few Grit Jokes in hopes of bringing a smile to your face. Try them on your kids:

How did Reese eat her grits? Witherspoon 🤔

Customer: Yes, I'd like 125 copies of the new cookbook about grits

Book Store Sales Clerk: Uh Hominy?

Did you hear about the man who choked to death on grits?

The police are treating it as a hominycide

I know, I know....a little "corny!"

Making An Impact

*[Dan Luthi](#), fellow [#AccountingSalon](#) member and great friend, has helped three members of his team get enrolled in our advisory training. Check out [Ignite Spot](#), where Dan is the COO, and see how this group of innovators view the world. **BONUS: I will be speaking with Dan via LINKEDIN***

**LIVE TODAY 6/15 @ 1PM PST,
TUNE IN [HERE](#)**



